



Agency Priority Goal | Action Plan | FYs 2022–2023 | FY 2022 Q1–Q2

Improve Equity in our Supplemental Security Income Program

Co-Goal Leaders: Stephanie Hall, Assistant Deputy Commissioner, Office of Operations
Stephen Evangelista, Acting Deputy Commissioner Office of Retirement
and Disability Policy

Goal Overview

Goal statement

Improve equity in our Supplemental Security Income (SSI) program through increased outreach and improved benefit delivery, including to communities of color and underserved communities.

- By September 30, 2023, increase the number of all SSI applications by 15 percent, relative to the 2021 baseline, restoring rates closer to pre-pandemic levels.
- By September 30, 2023, increase the number of SSI applications from underserved communities by 25 percent, relative to the 2021 baseline.

We define “underserved communities” as ZIP codes with a 30+ percent decline in SSI applications between FY 2019 and FY 2021 *and* majorities of (a) people of color *and/or* (b) people living at or below the 150 percent Federal poverty threshold.

Goal Overview

Problem to Be Solved

- The number of SSI applications have decreased every year since 2010, including a pandemic-era decrease of 13 percent between 2019 and 2021. The SSI program rules are administratively complex and we have limited digital tools.

What Success Looks Like¹

- Increasing the overall number of SSI applications in order to ensure we are restoring service closer to pre-pandemic levels.
- Increasing the number of SSI applications from underserved communities and communities of color to restore applications closer to pre-pandemic levels.
- Identifying and mitigating barriers resulting from our policies, systems, and operations that may make it more challenging for individuals to reach us.
- Increasing the number of SSI protective filings received compared to FY 2021 levels.
- Improving the public's understanding of the SSI program through targeted outreach.
- Increasing the number of community-based third-party partners and the referrals, protective filings, and SSI applications they secure.

¹ Demonstrates progress towards achieving our Agency Strategic Plan's Identify and Address Barriers to Accessing Services, Build a Customer-Focused Organization and Improving the Accuracy and Administration of Our Programs strategic objectives.

- Conducting customer experience research and gathering feedback using human-centered design testing related to simplifying the Application for Supplemental Security Income (SSA-8000 and SSA-8001) so that the application is more accessible and easier to understand, both for the claimants as well as their representatives.

Tracking the goal

Goal target(s)

Achievement statement		Key indicator(s)	Quantify progress			Frequency
Repeat the achievement statement from the goal statement on the previous slide		A "key performance indicator" measures progress toward a goal target	These values enable us (and you!) to calculate % complete for <u>any</u> type of target			When is there new data?
By...	We will...	Name of indicator	Target value	Starting value*	Current value**	Update cycle
09/30/2023	Increase the number of all SSI applications by 15 percent, relative to 2021 baseline, restoring rates to pre-pandemic levels.	Number of all SSI applications	1,851,314	0	743,406	Monthly
09/30/2023	Increase the number of SSI applications from underserved communities by 25 percent, relative to the 2021 baseline.	Number of SSI applications from underserved communities	136,706	0	54,291	Monthly effective FY 2022 Q3
		SSI protective filings using electronic SSI Protective Filing	N	Not available	Not available	Monthly effective FY 2022 Q3
		Customer Experience SSI Research	Complete initial research by FY 2022, Q4	Not available	Not available	Quarterly effective FY 2022 Q3
		SSI applications received from third party partners	N	440	2,389	Monthly

* As of 09/24/21

** Value represents fiscal year to date performance as of the end of the most recent quarter

Goal Team



Leadership Team

Stephanie Hall, *Assistant Deputy Commissioner*
Office of Operations – Co-Goal Leader

Stephen Evangelista, *Acting Deputy Commissioner*
Office of Retirement and Disability Policy – Co-Goal Leader

Senior Advisor (Office of Operations)

Associate Commissioner (Office of Retirement and Disability Policy)
Office of Income Security Programs



Implementation Team

Associate Commissioner (Office of Communications)
Office of Strategic and Digital Communications

Assistant Deputy Commissioner (Office of Systems)

Regional Commissioners (Office of Operations)
Regional Offices

Goal Strategies

Implementation Strategies:

- **Improve service delivery**
 - **Improve our understanding of our customers and improve access.**
 - Document the user journey associated with applying for adult SSI disability payments and identify specific rules and requirements that are good candidates for simplification.
 - Assess specific simplification proposals to reduce administrative burden without reducing program integrity.
 - Apply this research to inform our planned application simplification and expansion of online SSI services.
 - **Simplify the application process**
 - Implement an online tool for individuals and third parties to establish a protective filing for SSI. Establishing a protective filing date is the first step in the SSI journey. An online tool will enable individuals to express intent to file for SSI benefits without waiting for agent-assisted service or sending a mailed request. We expect high usage among individuals, representatives, and others² who provide services to people facing barriers to accessing our services.
 - Implement the simplified SSI application across service channels.
 - **Address barriers to filing for SSI**
 - **Technology and Access Barriers**
 - Reopen our Field Offices to unscheduled visitors and people facing barriers.

² Other providers include, for example, State and local service providers, medical service providers, housing and homeless shelter administrators, local disability advocates and service providers.

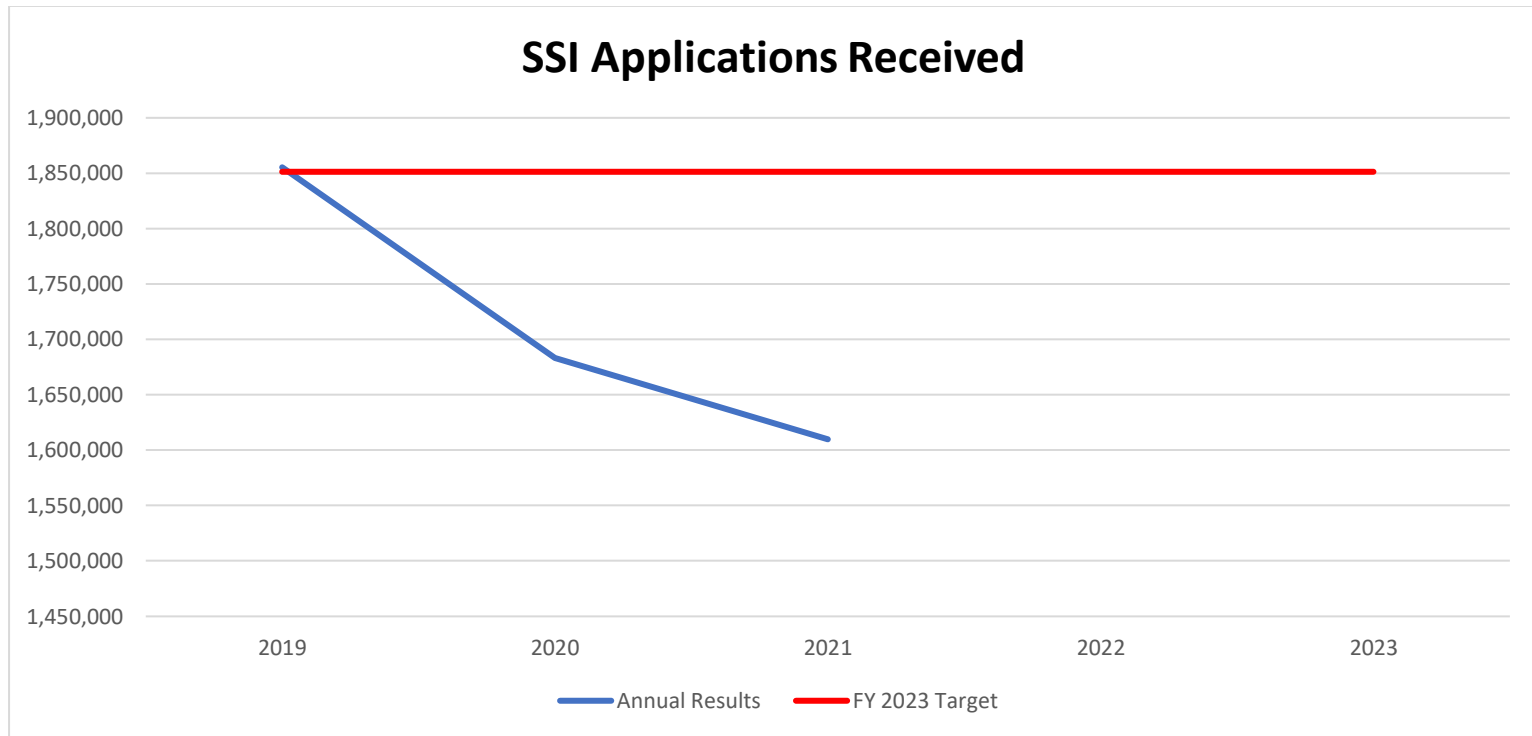
- Modernize our National 800 Number platform and telephone capabilities to improve telephone service delivery.
- Expand access to SSI services online, including wage reporting and the online protective filing tool.
- Conduct focused outreach and marketing to reach SSI-eligible people in underserved communities based on demographic data (e.g., access to Field Offices, predominant modes of transportation, spoken language, age, and broadband access).
- Identify additional community-based partners in underserved communities and communities of color to expand our reach through third party advocates and service providers.
- **Economic, Policy, and Social Barriers**
 - Assess the effects of changes to our service delivery methods on the accessibility, use, efficiency, security, and equitable delivery of our services.
 - Assess whether the Disability Insurance (DI) and SSI programs are equitably serving and meeting the needs of those intended
 - Assess the effects of simplifying administrative rules and requirements on reducing the burden on program participants while supporting program integrity.

External Considerations

- There are many reasons that might shape an individual's decision to file for SSI benefits that are outside our control; and
- Research suggests that increasing the number of applications may not be achieved by simply expanding access to representation or third-party partnerships.

Key indicators

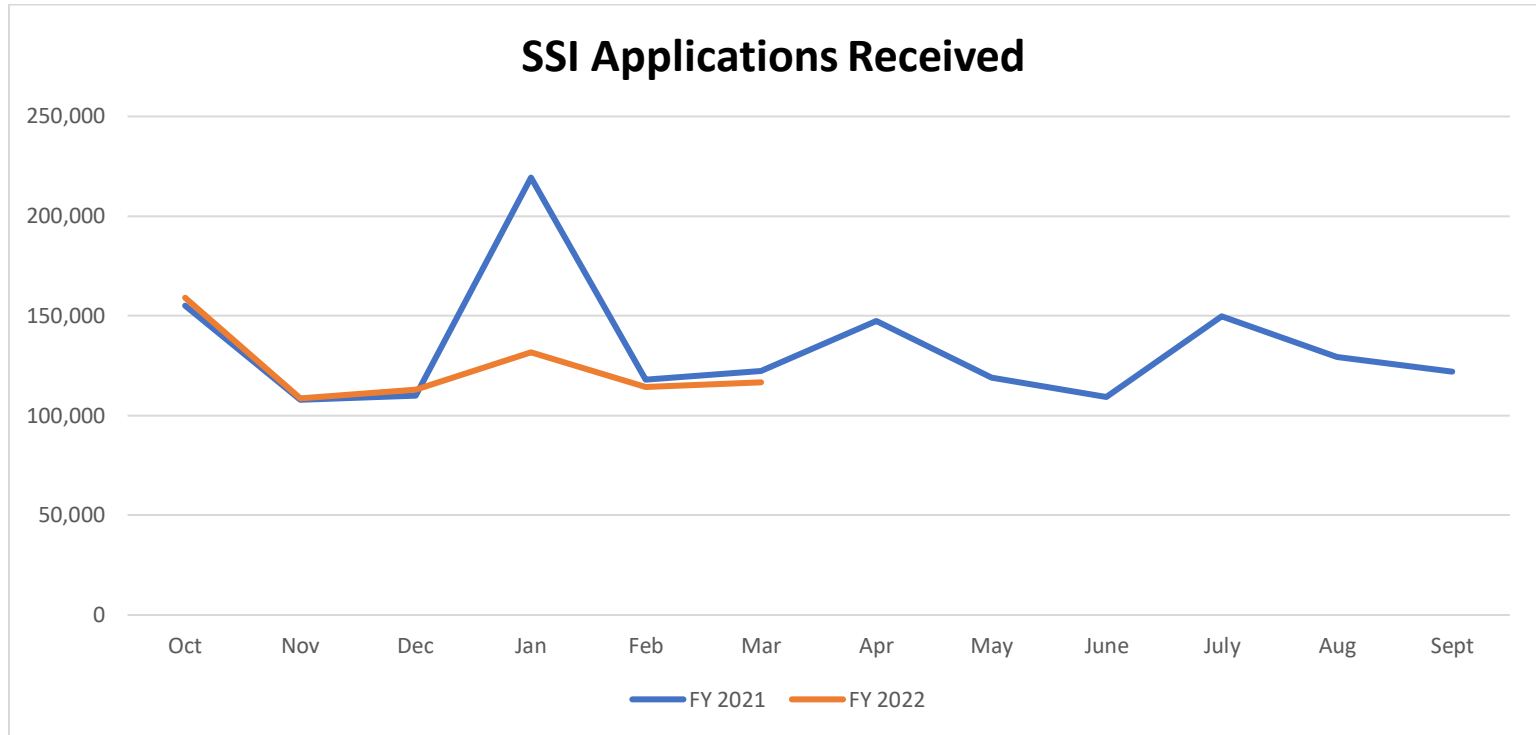
Primary Indicator: Total SSI Applications³



³ Returning to previous expectations would require an increase of about 7 percent of SSI applications per year in FY 2022 and FY 2023.

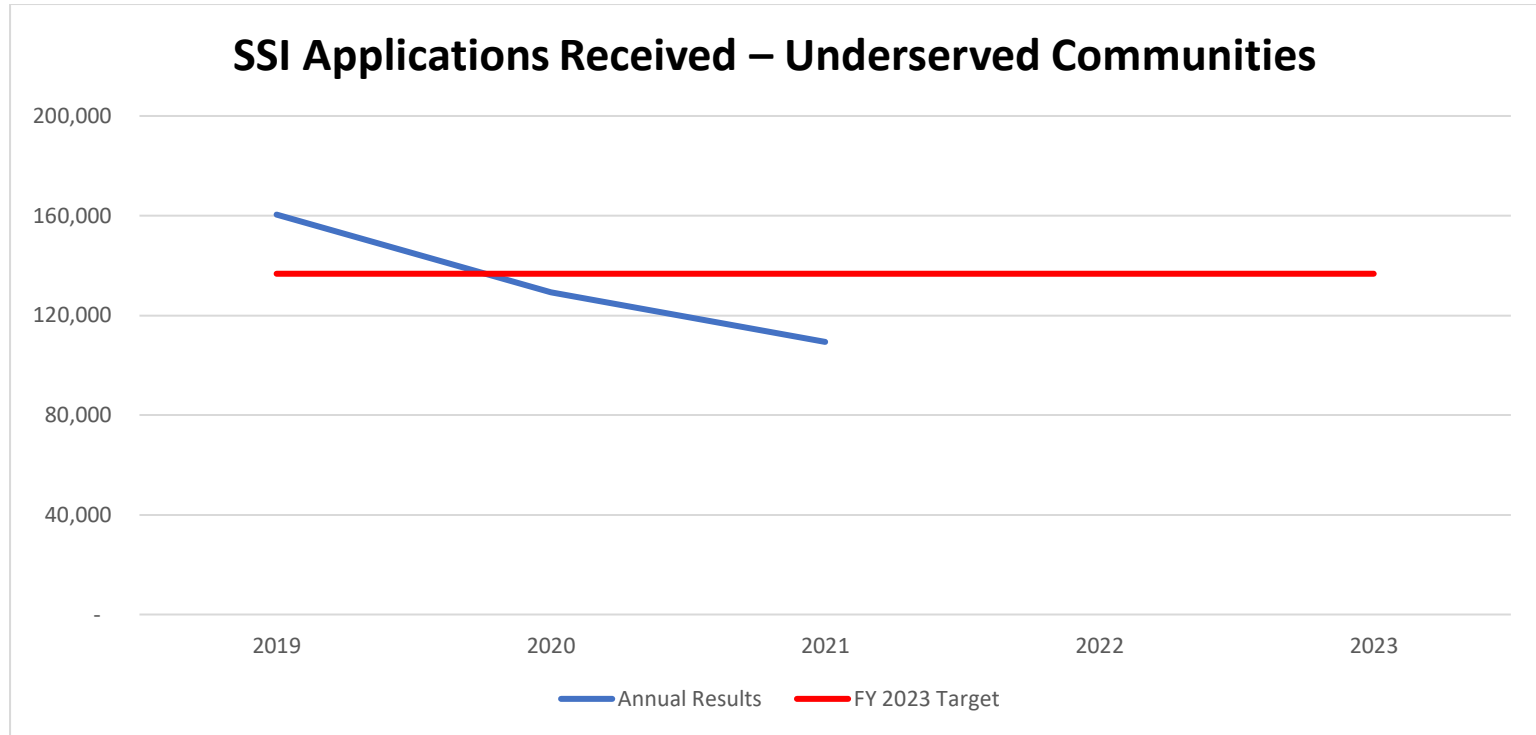
Key indicators

Primary Indicator: Total SSI Applications



Key indicators

Primary Indicator: SSI Applications from underserved communities



Key milestones

Milestone Summary

Key Milestone	Milestone Due Date	Milestone Status	Comments
Finalize usability testing for online SSI protective filing tool	Q1 FY 2022	Complete	
Finalize framework for SSI application simplification	Q2 FY 2022	Complete	
Identify underserved communities and baseline FY 2021 data	Q2 FY 2022	Complete	
Implement online SSI protective filing tool	Q2 FY 2022	Complete	
Initiate outreach in 25 percent of underserved communities	Q3 FY 2022	On-Track	
Complete SSI customer experience research	Q4 FY 2022		
Identify the basic eligibility questions for a simplified SSI application	Q4 FY 2022		
Expand outreach in underserved communities by 25 percent	Q1 FY 2023		
Finalize prioritized list of SSI application improvements	Q1 FY 2023		
Expand outreach in underserved communities by 50 percent	Q2 FY 2023		
Explore strategies to improve how we define and identify underserved communities	Q3 FY 2023		
Increase SSI protective filings received through the online protective filing tool by 20 compared to FY 2022	Q4 FY 2023		
Increase SSI applications in underserved communities by 25 percent relative to the 2021 baseline	Q4 FY 2023		
Increase SSI applications nationwide by 15 percent relative to the 2021 baseline	Q4 FY 2023		

Narrative – FY 2022 Q1–Q2

Through the second quarter of FY 2022, we continued working with dedicated third-party community partners providing referrals, submitting leads, and assisting claimants in completing SSI applications. We also implemented an online protective filing tool making it easier for individuals and third-parties to express an intent to file for benefits. We developed a methodology to identify underserved communities and communities of color that are most impacted by declining SSI application rates.

The online SSI protective filing tool was implemented on March 19, 2022. FY 2022 Q2 data shows high third-party usage, particularly among parents and guardians interested in filing for SSI for children. About 20 percent of the tool users expressed dire need circumstances such as homelessness or terminal illness. We identified ZIP codes comprised of underserved communities and began working with our Regional Communications Directors to identify local communications and outreach strategies in the designated ZIP codes.

We launched comprehensive communications and a new business process in preparation for our Field Offices reopening to unscheduled visitors. We increased access to the SSI program by expanding in-person service to the public, identifying new third-party community partners, expanding State and local outreach to underserved communities, and launching an online and mailed supplemental Fact Sheet on SSI and other means-tested programs.

Data accuracy & reliability

In addition to the APG, we are implementing data gathering tools and procedures to track our progress related to the following activities:

- Outreach in underserved communities;
- SSI applications received from dedicated third parties;
- Number of SSI protective filings received through the new online protective filing tool; and
- Number of SSI protective filings and applications received from individuals and third parties in underserved communities.

Most of this data collection will be automated, with the exception of the incoming claims from dedicated third parties, which requires manual coding and reconciliation with our existing databases.

Additional information

Stakeholder / Congressional Consultations

Internal Stakeholders

Office of Retirement and Disability Policy (ORDP): We work with ORDP to identify simplification opportunities, streamline across benefit programs, and craft implementable policy.

Office of Systems (OS): We collaborate with our OS to build automated tools for employees and the public to administer our programs.

Office of General Counsel (OGC): We rely on agency counsel to interpret relevant statutes and assist in crafting implementable regulations.

Office of Human Resources (OHR): We work with the OHR to hire new employees and develop and deliver training.

Employees: We provide continuous training to our employees on program changes and delivering accurate and timely service to the public.

External Stakeholders

The Public: The public expects us to provide an easy and understandable way to file for benefits using different service channels.

Congress: Congress maintains an interest in program simplification, automation, and service delivery improvement for our customers across all service channels.

Labor Union Organization: The American Federation of Government Employees represents our Field Office employees and provides input to leadership within the Office of Operations.

Advocacy Groups: They advocate for the rights of people with disabilities, including advocating for secure and convenient service delivery options and in-person services for vulnerable populations.

